

# Information Organization, Usability, Currency & Accessibility (IOUCA) Meeting Minutes

**Date:** July 11, 2006

**Time:** 9:00 – 11:00 a.m.

**Location:** LC II, Room 353

## **Attendees:**

<input type="checkbox"/> Linda Aguilar (DHS)	<input checked="" type="checkbox"/> Neal Albritton (DOR)	<input checked="" type="checkbox"/> Shayn Anderson (EDD)
<input checked="" type="checkbox"/> Steve Branson (DHS)	<input type="checkbox"/> Donna Freeman (FTB)	<input type="checkbox"/> Theresa Giles (DHS)
<input checked="" type="checkbox"/> Jennifer Harper (DHS)	<input type="checkbox"/> Jeff Hillard (CDFA)	<input checked="" type="checkbox"/> John Jewell (CSL)
<input checked="" type="checkbox"/> Patrick Johnson (DOR)	<input type="checkbox"/> Bill Kodani (DOT)	<input type="checkbox"/> Richard Lehman (CEAP)
<input type="checkbox"/> Lee Macklin	<input checked="" type="checkbox"/> Anamarie Malone (DTS)	<input type="checkbox"/> Liz Mechem (Insurance)
<input checked="" type="checkbox"/> Frank Montez (DHS)	<input checked="" type="checkbox"/> Claudina Nevis (SCIO)	<input type="checkbox"/> Sally Nietering (POST)
<input type="checkbox"/> Joni Ogata (DMHC)	<input checked="" type="checkbox"/> Kristine Ogilvie (CSL)	<input checked="" type="checkbox"/> Bill Passavant (DSS)
<input type="checkbox"/> Rob Quigley (SCIO)	<input checked="" type="checkbox"/> John Quijada (DMV)	<input checked="" type="checkbox"/> Deborah Schwartz (CRB)
<input checked="" type="checkbox"/> Brenda Washington (DHS)	<input type="checkbox"/> Morris Weisbart (CDFA)	

## **Previous Minutes and Action Items**

**Debbie Schwartz**

The meeting minutes for June 27th were approved with no changes.

## **Upcoming Meetings**

**Claudina Nevis/John Jewell**

The webmaster meeting has been scheduled for July 28<sup>th</sup>. The meeting will be held at CalEPA; the conference room has capacity for 300 people. If additional space is needed, a weblink can be provided in an adjacent room for an additional 200 people. Claudina handed out draft agendas.

Clark will open with an overview of his vision for the state's web presence and his vision document, [Government Services on the Web: California In-Touch](#). John will briefly address the framework document, [Policy and Management Issues Framework: Statewide Portal Project](#), and review the policy issues that are in progress. The IOUCA will then review its recommendations on accessibility, usability, and separating content from presentation. Department of Rehabilitation will provide an update on the web accessibility training. The Portal Redesign Project will finish the meeting with an overview of HFI's recommendations on usability for the state portal pages. It was noted that there could be considerable interest among the attendees in logo and branding issues. Anna Brannen (PRP) is scheduling a meeting in August for all webmasters to discuss branding, logo, and templates.

The Portal Steering Committee will meet on July 14, 2006. IOUCA will present the three recommendations adopted by the Review Board in June. If adopted by the Steering Committee, the recommended standards will become policy. The Steering Committee is the governing body for the state portal.

## **Proof of Concept**

**Claudina Nevis**

The State CIO (SCIO) website and EDD's website have agreed to serve as proof of concept for the standards proposed by IOUCA. EDD's redesign is in progress. SCIO will redesign their website with assistance from FTB using templates incorporating CSS for style and positioning. The redesigned website will meet the standards proposed for usability, accessibility, and separating content from presentation. Metrics will be gathered during the redesign process and lessons learned shared for other departments approaching a redesign.

## **Portal Redesign Project Update**

**Anamarie Malone**

HFI will present the results of their usability testing on July 12, 2006. The room is at capacity, but the presentation will be available through a web link.

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### Status Updates – Recommendations to Steering Committee

### Working Teams

**Accessibility:** The sub team is making some last-minute wording changes. The recommendation should be finalized today.

**Usability:** The sub team is incorporating feedback into the recommendation. The how/what/why format didn't work for the usability recommendation because the issues are not as clearly defined as accessibility. Liz is working on communicating the concepts with executives. The document will be finalized by Friday.

**Style Sheets:** Feedback was received from DSS following their real-world review. The sub team will discuss the recommended changes and incorporate into the document. The recommendation should be finalized tomorrow. DMV and DHS have not yet performed a real-world review; they will do this during the open review period following adoption by the Steering Committee.

### Recommendations for September Presentation

### Working Teams

Sub teams will begin gathering information with work beginning after the Steering Committee meeting on July 14.

#### ➔ Usability

Donna Freeman  
Kris Ogilvie  
Liz Mechem  
Linda Aguilar

#### ➔ Technical Implementation

Steve Branson  
Patrick Johnson  
Morris Weisbart  
Frank Montez  
John Quijada

#### ➔ Content

Debbie Schwartz  
Shayn Anderson  
Jennifer Harper  
Bill Passevant

#### ➔ Findability

John Jewell  
Jennifer Harper  
Anamarie Malone  
Neal Albritton  
Steve Branson  
Michael Clark (DSS)

### Action Items

### Debbie Schwartz

**ACTION:** Develop a list of file types and versions that should be used for California web pages. The list should be prioritized by most desirable and focused on where we want to be in the future rather than where we are now.

**Assigned To:** Neal Albritton, Steve Branson

**Due:** August 1, 2006 (Update)

**Update:** Neal has completed the list of accessibility requirements for Adobe products; he will send to Debbie for distribution to IOUCA. Neal has scheduled a phone call with Troy Bare of Adobe this afternoon to set up a meeting next week to discuss California's accessibility requirements for Adobe products. Neal will meet with Lee to discuss other file types.

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**ACTION:** The working group discussed the need for a broader implementation plan than what is contained in the recommendation. It was felt that integrated document with next steps should be developed to guide implementation of the recommended standards.

John and Debbie will work on this offline.

*Assigned To: Debbie Schwartz, John Jewell*

*Due: July 25, 2006 (Update)*

*Update: In progress.*

**ACTION:** Follow up on the feasibility of using Executive Institute as a vehicle for ongoing training for executives.

*Assigned To: Claudina Nevis and Liz Mecham*

*Due: July 25, 2006 (Update)*

*Update: Claudina and Liz will determine how Executive Institute could serve as a vehicle for ensuring that executive management understands the business needs for accessible, usable websites as well as what needs to be done to achieve this.*

**ACTION:** Discuss a process for disseminating information to content providers and webmasters quickly. Prepare a plan to establish ongoing communication with webmasters.

*Assigned To: John Jewell*

*Due: July 25, 2006 (Update)*

*Update: Claudina is working on a survey/request to be issued by the State CIO asking departments to provide the name and contact information for a single point of contact for their department's webmasters. A meeting is planned for July 28, 2006 to present the IOUCA and HFI recommendations to state webmasters.*

**ACTION:** Follow up on the feasibility of using GTC as a vehicle for ongoing technical training.

*Assigned To: Claudina Nevis and Liz Mecham*

*Due: October 10, 2006 (Update)*

### **Parking Lot**

1. Frame the issue of application accessibility and usability.

*Assigned To: Lee Macklin*

*Due: July 25, 2006 (Update)*

*Update: It was noted that many online applications are written by consultants; the state may not have the necessary skills to make changes. It was suggested that the two parking lot items be considered as Phase 2. IOUCA will need to work closely with CEAP on the two items. Lee Macklin and Neal Albritton will meet to discuss the issues.*

2. Conduct high level research and frame the issue of accessibility and usability in regards to online forms.

*Assigned To: Lee Macklin*

*Due: July 25, 2006 (Update)*

*Update: See above.*

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3. Content authors may benefit from training and instruction in writing for the web. There is a need for training for content developers. It may be beneficial if the IOUCA could identify these training needs. DHS offers web author training for readability, usability, and targeting information to the specific audience.

**Next Steps**

**Kris Ogilvie, Debbie Schwartz**

Next IOUCA Meeting: July 18, 2006

Library & Courts II, 900 N Street, Room 340

9:00 – 11:00 a.m.

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## Open Issues

Debbie Schwartz

1. How can the state design templates for current technology standards while accommodating departments with a wide range of expertise and software tools?  
*The Review Board noted that some content management solutions can resolve this issue, but not all departments have strong content management systems in place. DTS is considering offering support. It was recommended at the IOUCA meeting on March 14th that we consider offering a resource gallery of images that can be used by any state department. It would be possible to offer a suite of templates using different color palettes that meet accessibility requirements. Before this can be decided, the issue of single look-and-feel for all California pages vs. multiple look-and-feel with common branding needs to be resolved at a higher policy level.*
2. How can California enforce the standards after adoption? ***How will California ensure the application of standards across departments and over time (quality assurance)?****[added 5/2]*  
*California will likely approach adoption from an incentive perspective rather than an enforcement perspective. An exception is Section 508 compliance, which is mandated by state and federal law.*
3. Should tools to implement standards (CSS, templates) be developed for current look and feel as well as new look and feels?
4. Guidelines are not always followed. Would it be better to develop standards only, but drive by level of compliance? For example,
  - Level 1 Standards: Minimal accessibility
  - Level 2 Standards: Moderate accessibility
  - Level 3 Standards: High accessibility*Departments could be encouraged to work toward improving their websites by qualifying for higher levels. The state could provide “paths to accessibility” and could provide training for each level.*
5. What skill sets will be needed to communicate, maintain, and implement the standards, guidelines, and tools the IOUCA is recommending?
6. How do we separate content from HTML (CSS only separates content from presentation)?  
*This can be done through master templates in Dreamweaver, content management systems, or hard coding. The team needs to determine if this is part of our scope.*